

MATERIALS MANAGEMENT FORMS

CAM 4.5

DATE: 1/28/00

A. PURPOSE:

Describes the sales approval, acquisition, and sales of specified departmental state paper forms by the Department of General Services' (DGS) Materials Management (MM) for redistribution in small quantities to individual State agencies as needed and ordered. This procedure does not apply to standard (STD) state forms, which are available from the Office of State Publishing (OSP).

B. DEFINITIONS:

1. **Form Review (FR)** – A document prepared by MM that advises departmental Forms Coordinator of inventory level and reorder recommendation for forms redistributed from MM warehouse. Departmental forms have been identified in the Materials Management Supply Catalog.
2. **Materials Services Module (MSN)** – A part of the Procurement Information Network (PIN) System. This computer system houses all information related to inventory and ordering of products sold by MM.

C. POLICIES:

1. Forms design, format, and content of forms are established by the responsible State agency designated Forms Coordinator.
2. MM obtains bulk quantities of the forms from OSP.
3. To ensure that an adequate inventory of the selected state forms is available, MM uses inventory management practices to coordinate with the appropriate State agency to order additional forms as required. In the event that forms area not being sold, MM may recommend to the state agency responsible for the forms they be converted to electronic forms or discontinued for sale.
4. Specific policies related to order payment, shipping, and returning forms are contained in the "Materials Management Supply Catalog".
5. All mail orders are filled and packaged by MM warehouse staff, and shipped to the ordering agency via United Parcel Service (UPS) or freight.
6. In the event that forms are not being sold, MM may recommend to the responsible State agency that they be returned to the owning agency or discontinued for sale.

D. PROCEDURES:

1. How to Purchase a Form

a. Obtain Form and Price Information

Product and price information is contained in the Materials Management Supply Catalog. You can request a free catalog from MM Customer Services at: (916) 928-4630; or it can be picked up at the MM Public Counter located at 1700 National Drive, Sacramento, CA 95834.

b. Obtain and Complete Order Forms

To order forms, complete a Supply Order form (STD 116). The STD 116 can be purchased from the Office of State Publishing. On-line agencies to PIN can complete the STD 116 electronically. *(Note: Instructions for completing the STD 116 form and payment methods are located on reverse of the form and in the Material Services Catalog.)*

c. Submit Order Forms/Requests

State agency customers can submit their forms orders using any of the following methods:

I. Mail via U.S. Post Office or IMS Mail to the following address:

Procurement Division
Materials Management Publications Unit
P.O. Box 1015 (IMS: P-7)
North Highlands, CA

II. Fax to the fax number in the Materials Management Supply Catalog.

III. If the requested items are in stock, hand deliver the STD 116 in person to the MM Public Counter or dock area located at 1700 National Drive, Sacramento, CA 95834.

d. Procurement Information Network (PIN) customers may submit their orders electronically. For additional information contact MM Customer Service at (916) 928-4630.

e. Details on how inventory levels are maintained by MM. State agency roles and responsibilities are contained in Appendix 1, Process for Maintaining Forms Inventory Levels.

E. APPENDICES:

[Appendix 1: Process for Maintaining Forms Inventory Levels](#)

F. AUTHORITY AND REFERENCES:

1. Statutory: None
2. Administrative: None
3. Procedural: None

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